

Going Viral: **Marketing Your RIM Program to Drive Culture Change**



Even the most carefully developed records and information management (RIM) program cannot be effective if it does not have a high level of awareness among employees across the organization. Using a mixture of traditional and innovative marketing techniques can raise a RIM program's profile and the influence it needs to be successful.

Andrew Altepeter

Records and information management (RIM) professionals must not be tempted to declare “mission accomplished” once they have established these critical elements of a RIM program:

- A policy that spells out roles and responsibilities
- Retention schedules
- A data classification schema
- Procedural documents that help employees properly retain and dispose of information
- A legal hold mechanism
- Training on these elements

To declare the RIM program complete at this point would be premature. Philosopher George Berkeley’s theory that only what is perceived actually exists – commonly expressed as “If a tree falls in a forest and no one is around to hear it, does it make a sound?” – should be applied to the RIM program: “Does a RIM program exist if there is no awareness about it across the organization?”

The answer is, “It may as well not exist because it is impossible for the RIM program to reach its primary goal of maintaining legal and regulatory compliance if the organization is not aware of it.” It takes advocacy to raise the RIM program’s profile, establish its value to the organization, and have the influence and ability to drive the culture change needed to accomplish its objectives.

That’s why it’s important to market RIM across the organization. There are many marketing techniques, both traditional and innovative, for driving awareness and achieving the culture change needed to sustain your RIM program. First, though, you must determine the current state of RIM program awareness so you will have a baseline for measuring success.

Establishing a Baseline

Prior to beginning a marketing campaign, you should capture the state of RIM within your organization’s culture. While you may have

your own observations on the state of the program, they may not be universally shared. Conducting a survey to capture a representative sample is a good way to gather others’ observations.

The survey sample must include people from all levels of the organization – executives, middle management, and individual contributors – from all corners of the organization. Ask simple questions that everyone will be able to answer easily, such as yes-no, multiple-choice, or rating/scale. Here are sample questions you might include in the survey:

Establishing a space for your program on your employee portal is perhaps the first step you should take to drive awareness.

- Are you aware of our RIM policy and procedures?
- How often do you reference these documents?
- Do you follow the retention schedule when maintaining our information?
- Do you know if you are impacted by any legal holds?
- When did you last take RIM training?
- On a scale of 1-10, how effective is the RIM program at promoting its objectives?

This baseline will help you communicate the current state to leadership, obtain needed resources for your initiative, and measure progress as the campaign continues.

Using Traditional Awareness Methods

Using some tried-and-true awareness practices is a good way to start your campaign. The effectiveness of each may depend on the culture of the organization. While most of these

are not enough to drive true culture change, they can at least help ensure compliance with legal and regulatory obligations.

Employee Portal

Establishing a space for your program on your employee portal is perhaps the first step you should take to drive awareness. A hub for your policy, procedures, retention schedule, training materials, and employee questions is an essential resource.

Work with your portal team to make sure your portal is consistent with the themes of other portals and

is linked and easily accessible. If you work for a small organization that does not maintain a network of employee portals, consider using a readily available online platform such as Weebly or Google Sites.

Compliance Training

While not the most exciting method of marketing your program, compliance training is necessary to ensure legal and regulatory requirements are met. It is also a good way to periodically remind employees of their obligations and show them where they can find help.

Training can occur in person or through an online learning management system, but regardless of the medium used, training should be direct, practical, relevant to the way people work, and current to the business and legal requirements. Consult ISO 15489-1:2001 *Information and documentation – Records management – Part 1: General* for guidance on training.

E-mail Newsletters

E-mailing employees may be the most effective way to spread awareness because it ensures the widest possible audience. Unfortunately, bureaucratic approval is often needed. Additionally, this medium may be reserved for only the most important messages, and there are many organizational priorities competing to fill employees' in-boxes. You will likely need to work with your internal communications team to ensure that you follow its requirements for all-employee e-mails.

Your RIM content will not be widely shared if you lack the tools for people to share it across the organization.

Posters

Using traditional print advertising is an easy way to get your message out. Work with your facilities team to place posters on announcement boards and in areas that are heavily trafficked, such as cafeterias, break rooms, restrooms, and hallways. Likewise, video boards can show slides that promote your message.

Keep in mind, though, that such advertising is often ignored and may be forgotten by the time the employees return to their work stations. If you choose this method, work with your marketing team to stay consistent with the branding of other promotional materials.

RIM Day/Month Initiatives

Several years ago, ARMA International declared the month of April to be "Records and Information Management Month." Use this hook to bring your RIM initiatives into focus – using April or any other month. Work with the internal communications team to develop an awareness plan for the specified month. The goal is

to build momentum in the selected month and carry it forward indefinitely.

Another initiative, similar to the popular "Records Cleanup Day," is a "RIM Day," during which RIM staff work with other employees to make sure paper and electronic information is appropriately classified, managed, and disposed of.

Using Non-Traditional Awareness Methods

In addition to using the traditional methods, these innovative

practices can help bring attention to your program.

Social Media/Collaboration Platforms

It is likely that your organization uses an internal collaboration platform, such as Google+ for Work, Facebook at Work, SharePoint, Jive, or something similar. Such platforms allow a place to host your content and promote RIM, presenting opportunities for the message to go viral within your organization.

Web Video

Use Vimeo, YouTube, or other video applications to create promotional videos or "commercials" for your RIM program. Share these products on your social media and collaboration platforms, increasing the audience and the likelihood of the video going viral.

Videos should be short, topical, and packed with useful information that will help employees do their work more efficiently. Whimsical, humorous videos are likely to capture the attention of employees, and animations can be equally effective. The quality

of cameras in smartphones and the many mechanisms for easy video editing make this method very attractive.

Tool Configurations

See if the team that manages your e-mail and collaboration tools can add customized banners, pop-up messages, buttons, or other features that include RIM program messaging or links to your portal or collaboration space. These interventions are especially effective because employees see them while at their work stations.

Easter Eggs

Easter eggs are similar to tool configurations, except their message is slightly hidden (though still easy enough to discover) and they surprise end users when found. This can be done electronically (through hidden features, pop-ups, or surprise messages) in software, but it may require specialized knowledge to code the messages.

The Easter egg method can apply to paper as well. For example, you can place fortune cookies with IG-specific messages in the cafeteria (assuming it is allowed by your cafeteria staff). The messages should be whimsical but relevant.

Going Viral

"Going viral," also known as achieving a "meme," is the rapid spread of information, generally aided by social media or collaboration tools. It is difficult to predict what information will go viral, but following are recommendations to increase its likelihood.

Have the Right Tools

Your RIM content will not be widely shared if you lack the tools for people to share it across the organization. Internal social media or a collaboration platform, as mentioned above, is a must. The good news is, most large organizations already have invested in these tools.

Trigger an Emotional Response

Just because this content is work related, it does not have to be boring and unemotional. Warn users of the real dangers of bad information management and remind them of the positive effects when it is managed well. Or, just make them laugh (while staying on topic, of course).

Express Positive, Useful Messages

Position your content as something that will help employees get their jobs done more efficiently and effectively. Include tips they can use to better their personal lives. If they find the content useful, they are more likely to share it.

Include Unexpected Topics

Just because your content is driving awareness of RIM, it does not have to focus on RIM topics alone. For example, talk about how information management and analytics can help a local professional sports team gain a competitive edge.

Make Your Content Easy to Find

Take advantage of any searching, tagging, and keyword features of your content management system in order to make your information easier to find and share.

Time Your Content Publishing

Publish your content during prime working hours when people are using the tools where the content is published. Today, even day-old content gets quickly buried.

Encourage Feedback

End your post with a question that encourages readers to respond in the comments section. The more that readers or viewers are engaged with the content, the more likely they are to share it.

Don't Overdo It

Be careful not to release content too often or your audience will begin

to ignore it. Find the balance between offering timely content and inundating the audience. Once a week, at most, is an appropriate interval to release RIM communications.

Measuring Your Progress

Use your system tools to measure how often your RIM portal is accessed and how often your various messages are viewed and shared. Chart these metrics to see if there is improvement in program awareness over time. After six months or a year, conduct a survey to determine the degree of culture change that your marketing

campaign has effected.

Stay in contact with your marketing and internal communications teams to ensure you are following best practices to drive awareness. Listen to their suggestions on how to tweak your messaging for maximum results. Eventually, the culture change will be visible in the way people manage their information in a more secure, compliant, and efficient way. **END**

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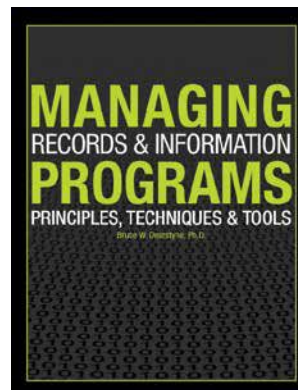


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Managing Records and Information Programs

This book was conceived to help records and information management (RIM) professionals become exemplary program managers, with well-organized RIM programs, effective delivery of products or services, empowered and enthusiastic staff, and satisfied customers.

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